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## HOUSING & RETIREMENT

### Housing

A clergy house, first and foremost, a home. It is also a place of work, and often the scene of evening meetings, as well as a contact point for parishioners. Clear boundaries need to be set to define the areas within the property. One approach is to keep all the “business” downstairs, with the stairway acting as a usefully physical definition of what is private. The family, though, also needs a focal point, so the “business” and “family” ends of things should be able to operate at the same time, and any children do not have to be consigned to bedrooms every time there is a meeting.

The cost of heating and lighting is the occupant’s responsibility (if the bills are paid by the PCC, the amount must be declared annually and will be deducted from your stipend), but the Inland Revenue allows a proportion as a tax concession. There is a form to complete each year and the tax code will be adjusted.

Those office holders provided with a house of residence, for the better performance of their duties, need to be aware of both their rights and responsibilities. These are detailed [here](#), however, are summarised as follows:

1. **Duties of the relevant housing provider as administered by the Glebe and Buildings Committee (‘the Committee’) are:**
  - ❖ To repair the structure and exterior of the buildings of the property, including windows, doors, drains, gutters and external pipes;
  - ❖ To repair all relevant walls, fences, gates, drives and drains of the property;
  - ❖ To repair and keep in proper working order installations related to the supply of water, gas and electricity, sanitation, space heating or heating water;
  - ❖ To arrange for a qualified surveyor to inspect the property at least every five years and submit a report describing its state and condition;
  - ❖ To send the office holder a copy of this report and after consultation carry out within a reasonable time frame any appropriate repairs;
  - ❖ To pay the council tax; and
  - ❖ To insure the property against all risks related to buildings.
  
2. **Duties of the office holder are:**
  - ❖ To permit the officers acting for ‘the committee’ to enter the property after giving reasonable notice; in order to inspect or carry out repairs or for another reasonable purpose consistent with its powers and obligations;
  - ❖ To keep the property and contents provided clean and free from deterioration;
  - ❖ To keep any garden or other grounds belonging to the property in a good state of upkeep;
  - ❖ To notify ‘the committee’ of any repairs required as soon as possible;
  - ❖ To pay the whole or part of any repairs which they are responsible for;

- ❖ To use the property as a private residence for his or her household only and for any other purpose only as agreed by 'the committee' or officers acting on its behalf;
- ❖ Not to make any repairs, alterations or additions to the property without the consent of 'the committee' or officers acting on its behalf;
- ❖ Where the property is held on a lease, to observe any binding term, condition, or covenant; and
- ❖ To vacate the property within one month of either ceasing to hold office or changing office and to leave the property clean, tidy and clear of all personal possessions.

### 3. Duties expected of the PCC are:

- ❖ Board of Finance houses will be maintained by the Diocese. However, if the house is owned by the PCC, liability for redecoration, repairs, running and repair costs of heating, lighting, telephone rental, water rates and council tax should be established. A contact name and address from the PCC should be obtained, to whom requests for repairs and accounts will be sent.

## Solving Disputes

Any disputes or objections regarding housing may be dealt with by the grievance procedure. Incumbents have the right of veto over the sale of the parsonage house. Priests in charge on common tenure have a right of objection to the Church Commissioners in the event of a proposed sale.

## Useful Information

For all appointments under Common Tenure, Sections 4-7 on the Ecclesiastical Offices (Terms of Service) Measure 2009 and part III of the Ecclesiastical Officers (Terms of Service) Regulations (Regulations 12 – 17) are dedicated to provision of accommodation; rights and obligations of housing providers and office holders; procedures for transactions and so on. Full text of the [Measure](#) and its related [Regulations](#).

More specific information on procedures relating to housing within the Diocese of Oxford will be found in the 'Housing Policy Document & General Guidance Notes' by the Buildings Management & Strategy Committee. You can obtain a full copy of this document [here](#).

The Buildings Management & Strategy Committee have produced a Frequently Asked Questions Living in a Clergy House in the Oxford Diocese document containing all the information you need to know about living in a clergy house. This document is divided into four main areas:

1. Internal Housing;
2. External Housing;
3. Moving into your Home and;
4. Moving out of your Home.

You can obtain a full copy of this document [here](#).

If you have any housing issues which cannot be resolved locally, please contact the Buildings and Glebe team at Diocesan Church House on 01865 208 200.

As indicated in the previous section retired clergy will find useful information on [‘housing’](#).

## Retirement

Clergy need to consider three main areas when preparing for their retirement:

1. Long term financial planning for retirement (including retirement housing) which needs to be considered right from the start if your ministry;
2. Start discussions with the Pensions Board about retirement housing in good time before retirement; and
3. Consider what ministry you might wish to offer in retirement.

Further information on this can be found within the [Supporting the Ministry of Retired Clergy document](#) (section 3 Preparation for retirement) located on the Church of England website.

The Diocese of Oxford have produced their own short guide that draws together our policy and guidelines for the [ministry of retired clergy](#).

## All clergy (stipendiary and self-supporting).

The Ecclesiastical Offices (Terms of Service) (Amendment) Regulations 2017, which came into force on 1 July 2017, the default position is that a clergy person holding office under Common Tenure is required to retire at 70, remains in place. However, should an office holder wish to remain in office beyond 70, Regulation 29A of the Regulations makes a provision for this.

Until the 2017 Amendment Regulations, there was a provision to enable a Bishop to extend the term of office of a priest-in-charge, team vicar, assistant curate or other licensed office holder who had reached the age of 70; however, the new regulation has restricted this power and replaces the more flexible arrangements that were previously in place.

The decision as to whether an offices holder can remain in office beyond the age of 70 is a decision for the Bishop. Should the Bishop wish to enable someone over 70 to exercise a ministry other than through PTO (Permission to Officiate) they are required to issue a written direction which authorises the holding of the office for a time-limited period.

The Archbishops' Council has issued guidance about the Age Limit Measure which the diocese is required to consider when extending an appointment in this way. You can obtain a full copy of this measure [here](#).

Following the revisions to the process for the Terms of Office beyond the age of 70 for parochial clergy, the diocese has produced a Health Questionnaire (for those over 70), a Bishop template letter along with a flowchart detailing how this process is managed to assist those who are involved in the process.

These are available to all those who are involved with the Terms of Office beyond 70 within the diocese and can be located on the Diocese of Oxford R drive; access is restricted to those who have the requirement.

R:\Store\Senior Staff\Clergy HR\Occupational Health and Questionnaires\Term of Office beyond 70

Clergy diocesan employees, on the other hand, have the same rights as other employees and will retire under diocesan employee retirement policy which will need to comply with employment law in whatever way that may be modified following the Government's consultation.

Clergy can also apply to the Bishop for Permission to Officiate.

## Permission to Officiate (PtO)

Clergy who have retired from office are able to exercise ministry on a basis of permission to officiate (PtO) which does not commit them to carry out any regular ministry.

The House of Bishops introduced a policy on granting permission to officiate which was approved by the House of Bishops Delegations Committee in July 2018. This agrees the structure and framework within which permission to officiate operates across the Church of England. You can obtain a full copy of this Policy [here](#).

The Diocese of Oxford adheres to the House of Bishops policy on granting/renewing permission to officiate and has developed their own process to be used within the diocese. This consists of an applying for PtO flowchart and renewal of PtO flowchart which informs you of the step by step process to obtain or renew your permission to officiate (PtO). Below are the relevant documents involved in the diocesan process for granting/renewing your PtO.

Applying for PtO	Renewing PtO
❖ <a href="#">Applying for Permission to Officiate flowchart</a>	❖ <a href="#">Renewing Permission to Officiate flowchart</a>
❖ <a href="#">Application Form</a>	❖ <a href="#">Mutual Expectation Written Form</a>
❖ <a href="#">Information on and conditions for PtO - FAQs</a>	❖ <a href="#">PtO Card</a>

❖ <a href="#">Mutual Expectation Written Form</a>	❖ <a href="#">Review Form Template</a>
❖ <a href="#">Review Form Template</a>	❖ <a href="#">Privacy Notice</a>
❖ <a href="#">Identification documents required for DBS checks</a>	❖ <a href="#">Confidential Declaration Form</a>
	❖ <a href="#">Identification documents required for DBS checks</a>
	❖ <a href="#">Information on and conditions for PtO - FAQs</a>

## Retirement Housing

For housing purposes, retiring clergy fall roughly into five categories:

1. Those who have a house of their own and wish to retire into it.
2. Those who have enough capital to enable them to purchase a property of their own.
3. Those who have some capital, and who wish to take advantage of the Pensions Board's new Shared Ownership scheme.
4. Those whose capital is very small or non-existent, and who would wish to rent a property from the Pensions Board.
5. Those who wish to move into Supported Housing - full details are available from the Pensions Board.

The Church of England Pensions Board is a registered charity that has operated the Church's Housing Assistance for the Retired Ministry (CHARM) since it came into operation in 1983. The objective of the scheme is to enable all clergy, deaconesses and licensed lay workers, who retire from the stipendiary ministry, having been in occupation of a 'tied house', with a suitable retirement property if they do not have the financial resources to provide such accommodation for themselves.

The Church of England Pensions Board has dedicated website pages on Retirement Housing including useful resources on what help and support is available and the housing schemes on offer, may be found [here](#).

The Church of England has produced '[Your guide to retirement housing booklet](#)' giving an overview of the shared ownership, rental and supported housing for people who have served or worked for the Church.

Retirement is a matter between you and the Pension Board. The Church of England has a [Clergy Pensions Scheme Booklet](#). For further details, please click on the link below and scroll down to section 3. Retirement (from page 8); section 4. Normal and Late retirement (from page 10) and section 5. Early retirement (from page 12).

The diocese runs pre-retirement courses for clergy and their spouses and will help and provide advice to clergy who are approaching retirement. Further details please be found [here](#) and in the [Continuing Ministerial Development Brochure](#).

## Financial assistance for stipendiary clergy families following death in service

Financial planning and security for the future is an important consideration for clergy and their families when thinking about what will happen should someone dies in service. As in other families, it is important that appropriate levels of life insurance cover are taken out to provide for family members and to compensate for loss of income. Clergy are strongly encouraged to take out such a policy if they have not already done so. However, the situation is made more complicated because clergy families usually live in houses provided by the Church and may not have another home of their own into which to move.

The archdeacon will spend time with the clergy spouse discussing the financial resources which they have, and the specific needs of the spouse and the family. If it is not possible for them to provide their own housing, the diocese would normally help them to make an arrangement with the Church of England Pension Board (CEPB).

For further information on 'Benefits on Death', please click on the link to [The Church of England Pensions Scheme Booklet](#) below and scroll down to page 16 section 8. Benefits on Death.

## Retired Clergy Representatives and Clergy Widows

The pastoral care of all retired clergy and clergy widows is undertaken primarily by the area deans and the parish priests of the parishes where they live. In order to co-ordinate their care, it is the Area Bishop's responsibility to appoint a Retired Clergy Representative (RCR) and Clergy Widows Officers in their archdeaconry. Further details about your RCR can be found within the [guidelines for the ministry of retired clergy](#) document. Please refer to your Archdeacon for the contact details of your Clergy Widows Officer.

## Retired Clergy Association

The Church of England has a Retired Clergy Association which aims to:

- ❖ Support and encourage retired clergy;
- ❖ Encourage retired clergy to meet;
- ❖ Keeps retired clergy up to date;
- ❖ Represents the interests of all retired clergy at national level;
- ❖ Encourages and supports Bishops in their pastoral responsibilities; and
- ❖ Become a community of prayer.

For further information please visit their [website](#).

**Church of England Pensions Board** - The charitable funds of the board may be able to offer additional help to retired members of clergy and their dependants in certain circumstances. Details can be found in section 12. Discretionary Help page 22 of [The Church of England Pensions Scheme Booklet](#).

There are also a number of other sources of support both in and out of the Church available on the Church of England's [website](#) (and then scroll down and click on Financial to view).